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The Latest Developments Affecting Private Family Trust Companies to be Featured at 2016 FOX PFTC Symposium

Pre-Symposium Workshop Also Being Offered for Families Considering a PFTC

Chicago, November 18, 2015 – Family Office Exchange (FOX), a global membership organization of enterprise families and their key advisors, has announced that its 2016 FOX Private Family Trust Company Symposium will be held February 9-10 in Miami Beach. The event will delve into the latest developments surrounding Private Family Trust Companies (PFTCs.)

Leading family representatives will share best practices on how PFTCs can provide families with control and transparency, elevate the family's governance and effectiveness in decision making, and serve as a center for family education. Highlights include:

- Industry pioneer Jay Hughes, Hartley Goldstone and Keith Whitaker of Wise Counsel Research Associates on the role a PFTC can play in sustainable family governance—a concept Hughes and FOX founder and CEO Sara Hamilton first introduced in 1991
- A panel of PFTC regulatory experts including Commissioner Greg Gonzales of the Tennessee Department of Financial Institutions and Commissioner Albert Forkner of the Wyoming Banking Commission, as well as representatives from New Hampshire and South Dakota
- Six family office executives with PFTC experience, including Jim Ruddy, President and CEO of The Dillon Trust Company, and Diane Malarik, COO of Moreland Management Company
- Leading attorneys in the PFTC field

“It’s an exciting time for private family trust companies,” says Mariann Mihailidis, Managing Director at FOX. “With more PFTC choices than ever and a rapidly-evolving legal landscape, this Symposium provides a place to catch up on all the latest changes and to learn about the experiences of other families with PFTCs.”

This year’s FOX PFTC Symposium features a special Pre-Symposium Workshop on February 9 designed specifically for families who are interested in establishing a PFTC. The Symposium itself, February 10, will focus on helping families with established PFTCs. Breakout sessions include a look at the burdens and solutions for operating a PFTC distant from home; a session on identifying and meeting client needs within a multi-family trust company; and an examination of U.S. PFTCs and foreign trusts, foreign assets, and non-U.S. resident family members.

Registration is open to anyone with or interested in establishing a PFTC. Full information about the event is available at <https://www.familyoffice.com/learning-events/forums/2016-private-family-trust-company-workshop-and-symposium>.

About Family Office Exchange

Family Office Exchange (FOX) is the premier global member network for enterprise families and their advisors who are pursuing best practices for managing their family enterprise and growing their family wealth. The community includes over 8,000 family leaders and sophisticated advisors from 460 organizations in 20 countries who utilize FOX's resources each year for advice, networking, education, and best practices in wealth management.

FOX is headquartered in Chicago with offices in New York, Santa Barbara, Sydney, and London. For more information about FOX email us at info@familyoffice.com or visit www.familyoffice.com.